

CHINA

MEDIA LANDSCAPE

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COUNTRY OVERVIEW



CHINA IN A SNAPSHOT

A success story that has truly put china on the global map



1.4 B

Population
World's most populous
country



\$13.41 T

GDP
Second highest Economy
in the world



\$63.8 T

Total Wealth
Economy grew at 2 x that
of the US in 2019



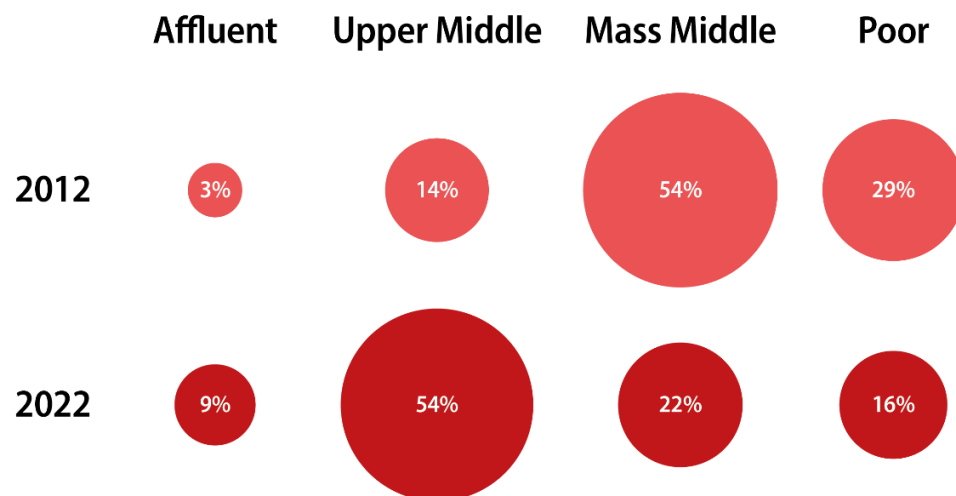
Top 10%

of Global Wealth
Holders 99,908

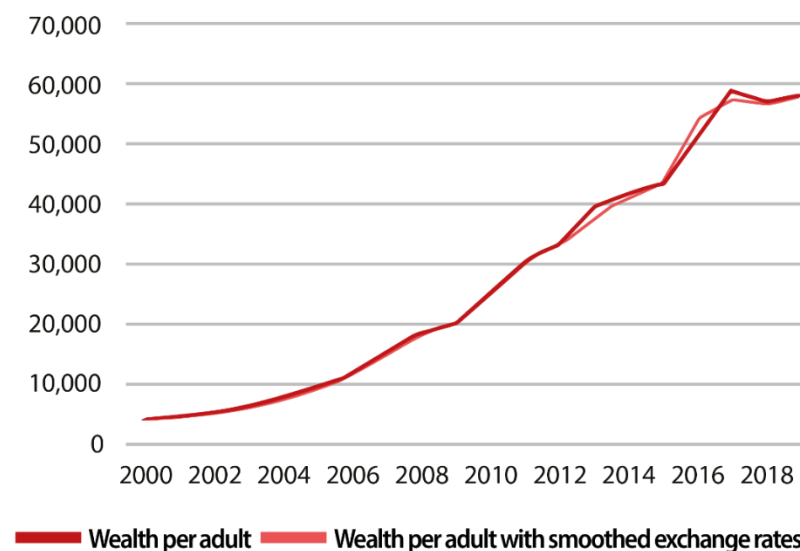
A STRENGTHENING ECONOMIC POSITION

An important consumer market

China's Middle Class as Percent of Urban Households



Wealth per adult over time



- The growth of wealth has seen masses go from lower middle-class to upper-middle class, drastically increasing their affordability of premium or luxury commodities and experiences.

Top 5 Key Cities in China

City	GDP	Population	Language	Economic Backbones	Key Economic Fact
Shanghai	USD 4.48 Bn	27 m	Mandarin/ Shanghainese	Commercial and financial center, international seaport.	Largest industrial base in China.
Beijing	USD 4.24 Bn	20 m	Mandarin	Finance, industrial, tourism	Service sector makes UP 81% of its GDP. Ranked as GFCI's top 10 financial centers in the world.
Shenzhen	USD 3.36 Bn	12.3 m	Mandarin/ Shanghainese	High-tech, finance, logistics.	China's fastest growing city- home to tech companies like Huawei, Tencent and Baidu.
Guangzhou	USD 3.22 Bn	13.3 m	Mandarin/ Cantonese	Transportation and industrial centre, manufacturing, textiles.	Steel complexes, paper mills, and factories producing tractors, machinery, etc.
Chongqing	USD 2.9 Bn	15.8 m	Mandarin	Industrial, Minerals, Natural gas, chemicals.	China's largest producer of motorcycles and one of the top 3 aluminum producers.

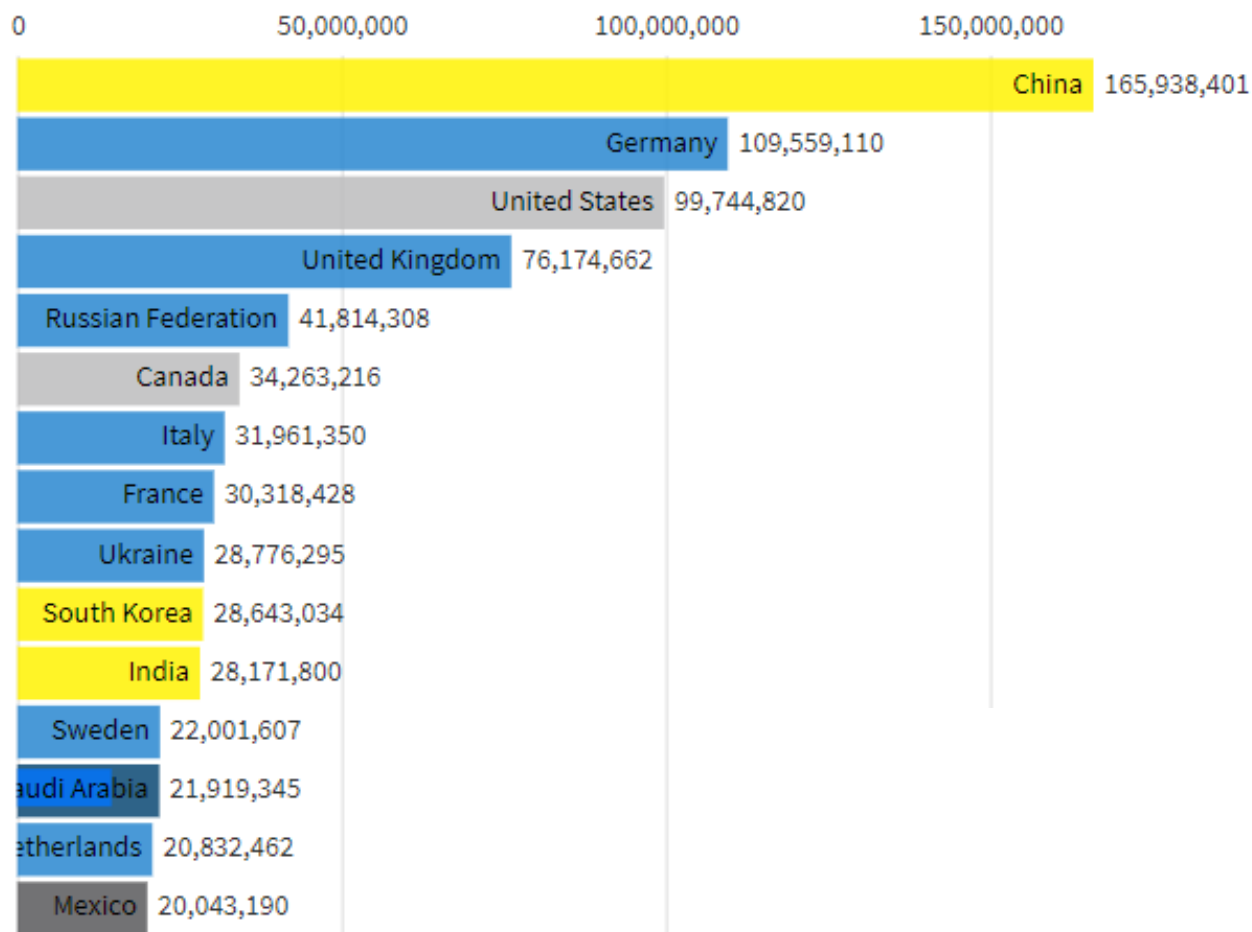
OUTBOUND TRAVEL INSIGHTS



OUTBOUND TOURISM OVERVIEW

China is one of the most important source markets for many destinations in the world

International Travel Departures by Country before COVID-19 pandemic



The market is expected to exceed US\$163 billion by 2024 despite Covid-19

Source: [Ftn News](#)

OUTBOUND TOURISM OVERVIEW

Travel pattern and preferences

TRIP DURATION

7-8 nights

BOOKING LEAD TIME

30-60 days

DESTINATION TIME

Safe and luxury destinations

KEY TRAVEL TIME

J	F	M	A	M	J	J	A	S	O	N	D



Avg spending of \$5,715/per person on outbound travel



Hong Kong and Southeast Asia are their most visited destination



Shopping and gastronomy are the key activities while on travel

- They are the 5th largest source market for the UAE.
- 2.9 M Chinese tourists are expected to visit GCC in 2022. 990,000 tourists visited UAE in 2019.
- YOY growth from 2018-19 in Chinese visitors to the UAE: 15.5%.
- 65% of Chinese tourists use mobile payment platforms during travel.
- 60% of bookings are made by women.



With \$257.7 B spent globally, China splurges the most cash on outbound tourism

MEDIA CONSUMER INSIGHTS



THE CHINESE MEDIA CONSUMERS



FLOURISHING OLD SCHOOL

- Newly rich families
- Device choice is guided by its social status- a flashy TV not only serves this purpose, but also adheres to their traditionalist values
- The Chinese masses spend long hours watching TV, being most popular with the middle-ages (32-67 year olds)
- **Key audience groups:** families, early teenagers, middle-aged couples



THE DIGITAL DREAMERS

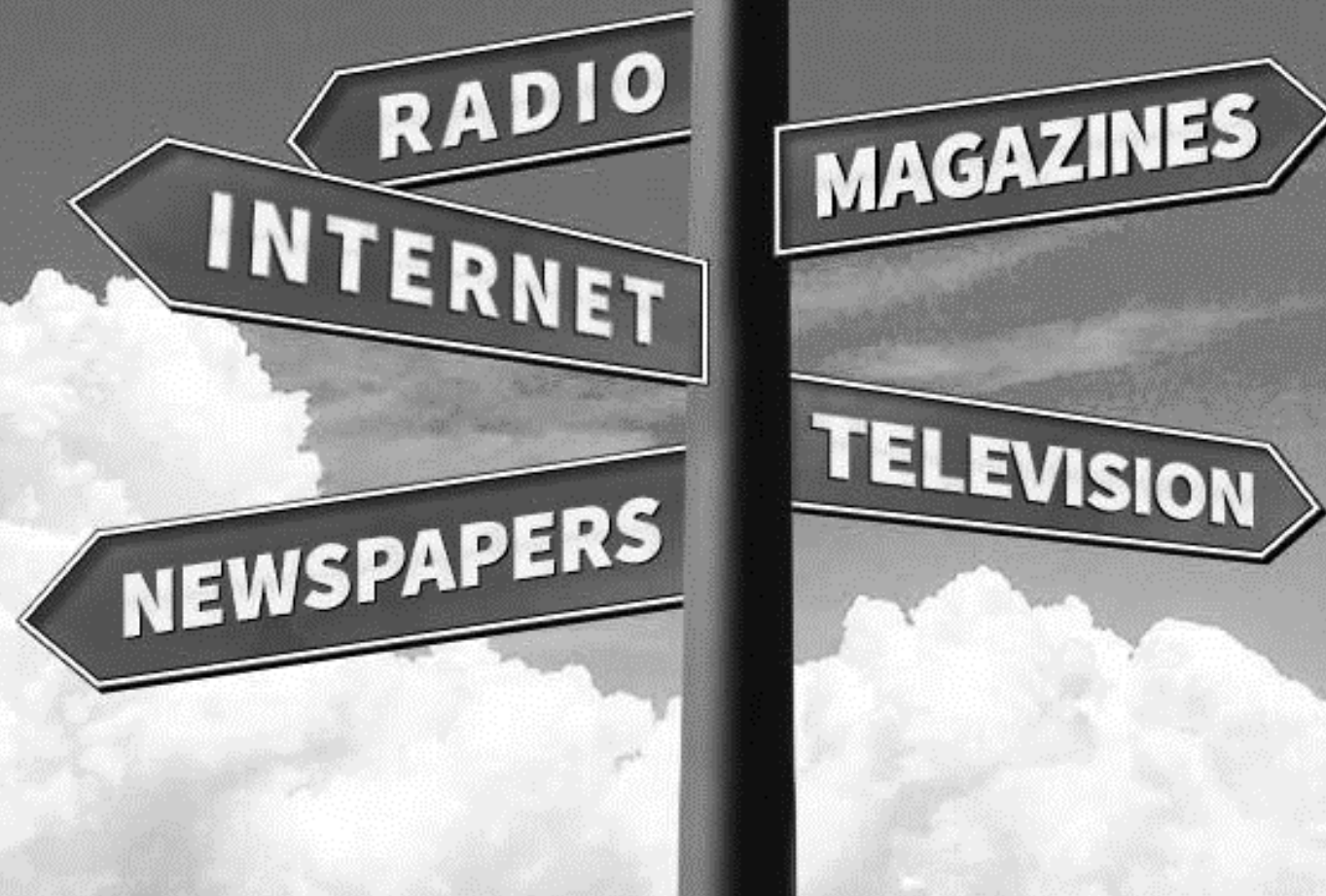
- The ambitious working-class population remain well-connected through digital devices
- Digital dreamers are most accessible to brand messaging in out-of-home settings
- **Key audience groups:** young, independent, working class, young couples



THE CONVERSATIONALISTS

- An older audience group, these consumers enjoy human conversation.
- Tuning into a radio station is how they pass their time and re-kindle the joy of bygone relationships.
- Television viewing forms a major part of their day
- Picking up such updates also enables them to contribute to real-life conversations.
- **Key audience groups:** traditional entrepreneurs, older middle-aged, older couples and travellers

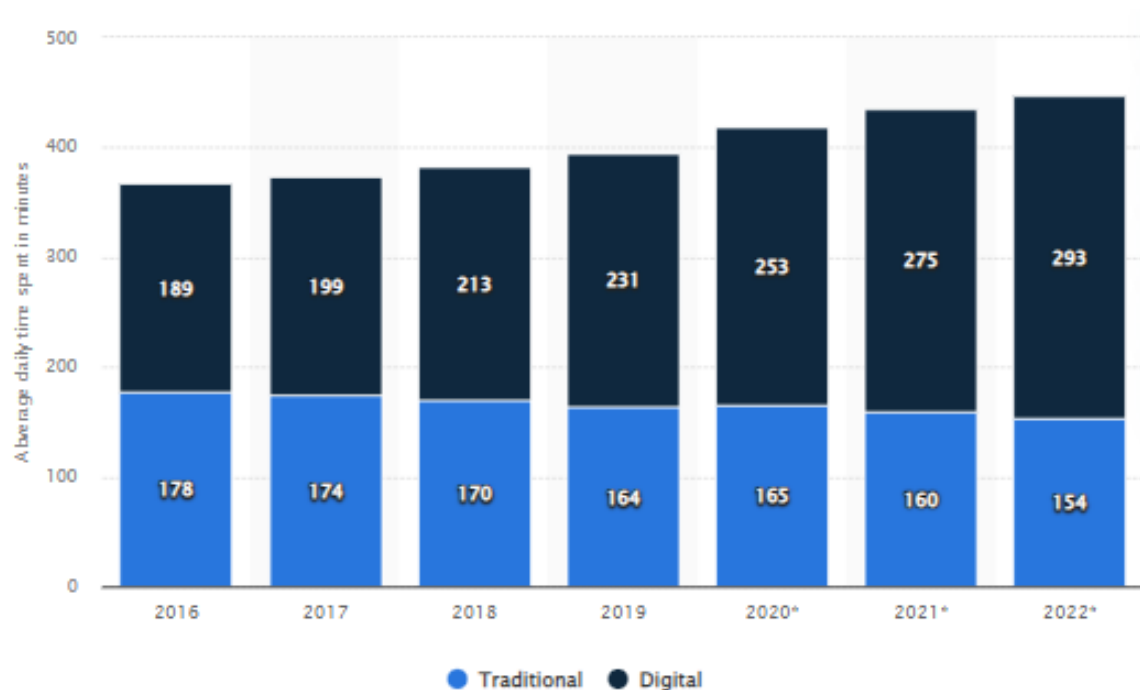
MEDIA LANDSCAPE



MEDIA CONSUMPTION TRENDS OVER THE YEARS

Digital and TV lead the pack

Average daily time spent on traditional and digital media by adults in China



The largest share of time is spent with digital.



TV is a popular medium across the country.



A declining readership of print but a loyal core audience.



12 minutes are spent listening to radio everyday.

TOP MEDIA PLATFORMS/TITLES IN CHINA

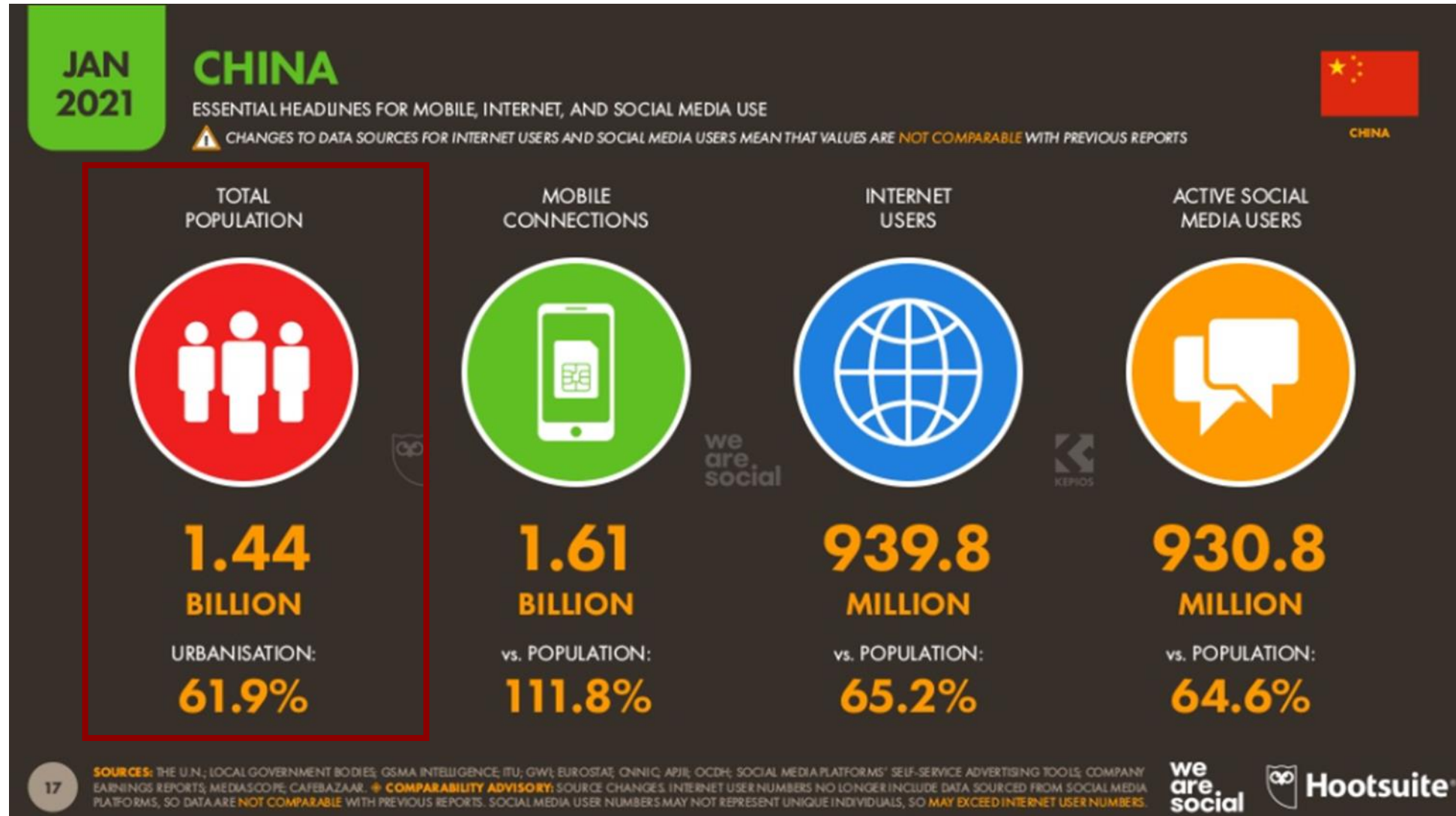
Media Channels	Sector	Platform/Title	MAU/Audience coverage/ Circulation
Digital	Instant Messaging	WeChat (Tencent)	959,372,700
	E-commerce	Taobao (Alibaba)	725,500,500
	Online Video	iQIYI	549,847,600
	Short Video	Douyin (ByteDance)	527,381,500
	News	Tencent News (Tencent)	297,007,200
TV	National flagship terrestrial TV network	CCTV	1,257,000,000
	Provincial satellite TV station	Hunan TV	1,290,000,000
Print	Newspaper	People's Daily	3,180,000
	Magazine	Caixin Weekly	338,000

DIGITAL



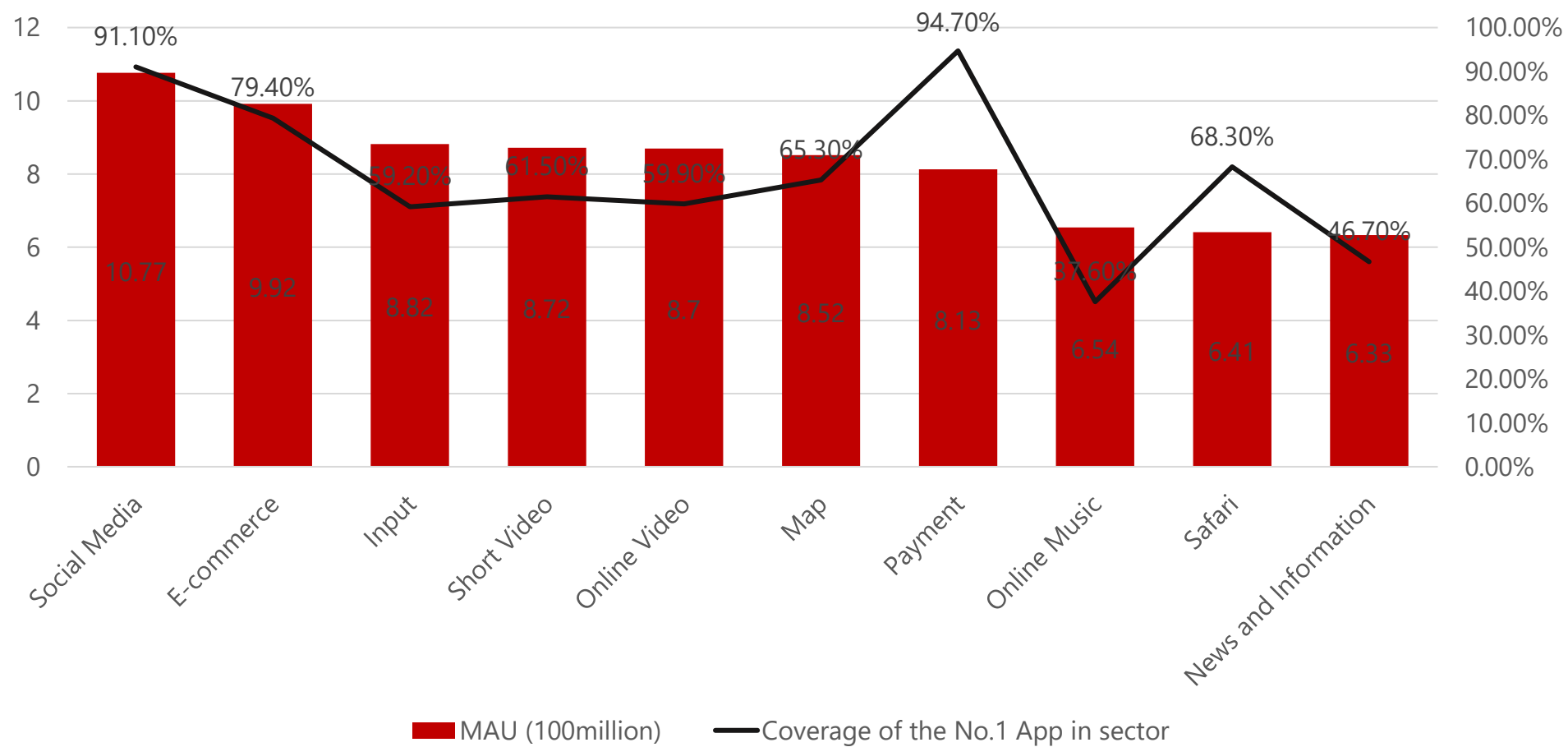
OVER A BILLION SOCIAL MEDIA USERS

Largest audience online any where in the world



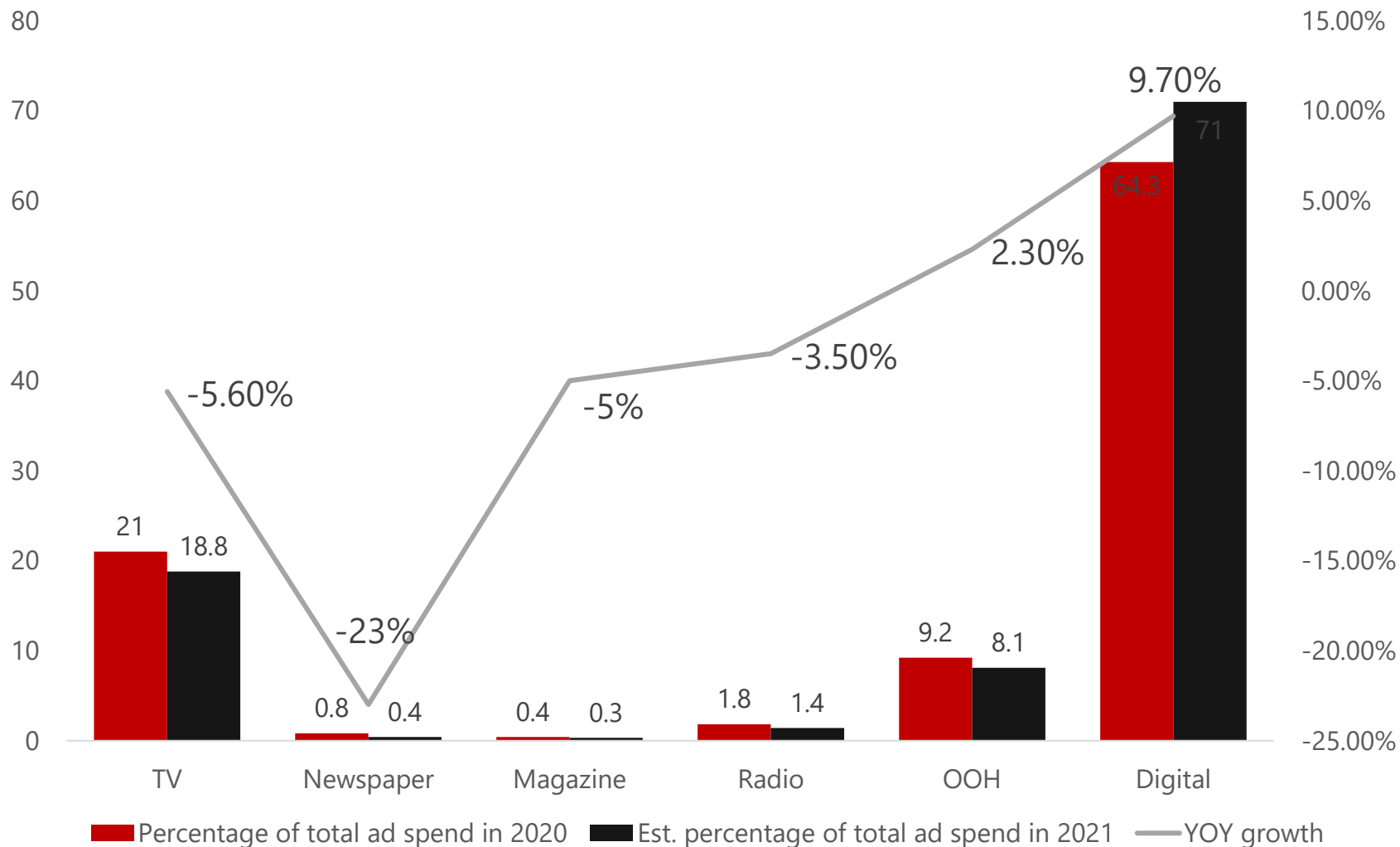
OVER A BILLION MOBILE CONNECTIONS

Active users on Chinese Mobile Apps according to sectors



AD SPEND AND GROWTH ACROSS DIFFERENT MEDIA CHANNELS IN CHINA

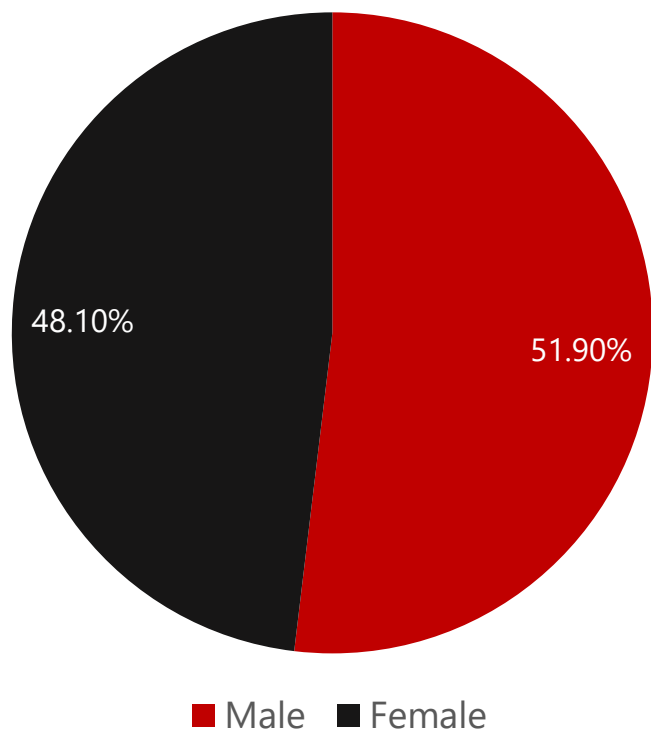
Digital sees the highest ad spend and YOY growth



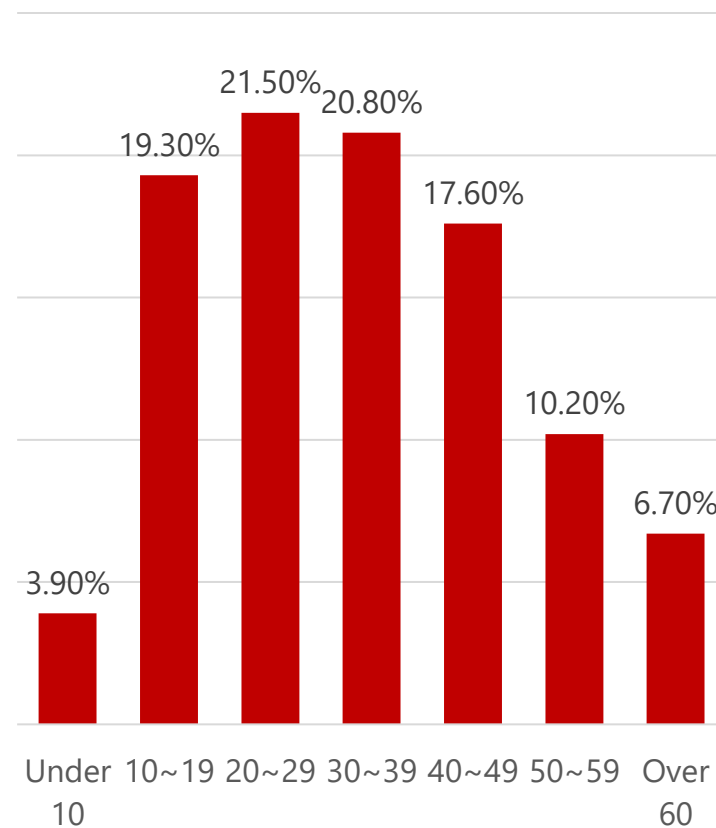
THE CHINESE NETIZEN

A young and middle-aged audience on the internet

Gender



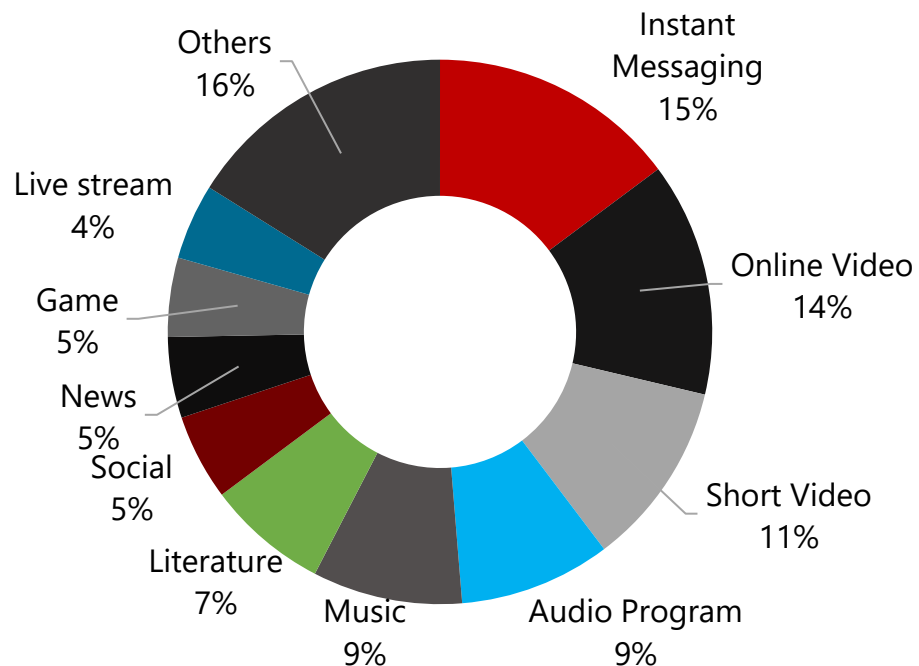
Age



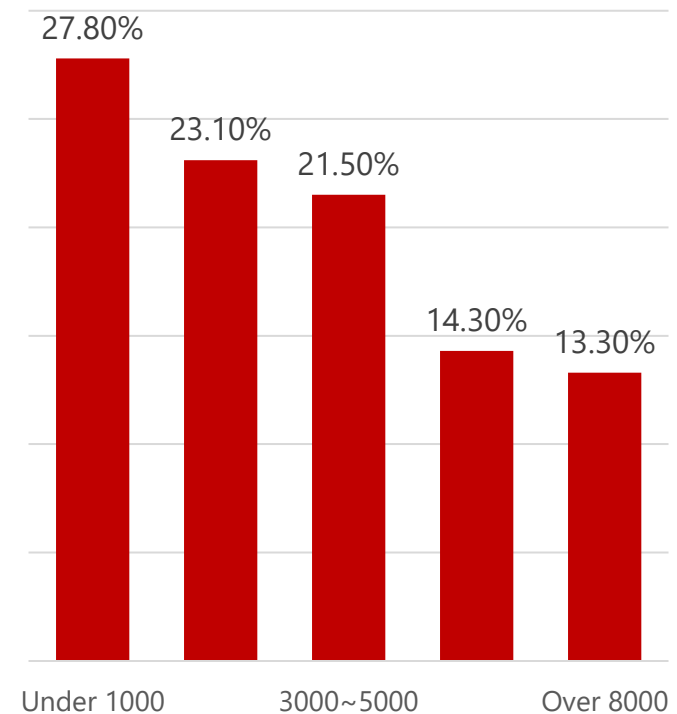
THE CHINESE NETIZEN

A population pressed on time

Percentage of time used by various APPs


















Personal monthly income (RMB)



The Chinese internet user has a preference for content in short video formats. Given that their personal income is at reasonable to high levels, this working-class population is pressed on time.

UNIQUE DIGITAL MEDIA

China has their own digital landscape due to Chinese firewall

GLOBAL The most popular global platforms are inaccessible in China	CHINESE EQUIVALENT China has a thriving digital ecosystem to compensate
Google 	Baidu, Tencent  
Facebook, Instagram , WhatsApp   	WeChat, QQ  
Twitter 	Weibo 
You Tube 	YouKu 
Skyscanner, Booking  	Ctrip, Tuniu  
Gmail 	QQ Mail 
Trip Advisor 	Mafengwo 

MOST USED SOCIAL PLATFORMS

WeChat has the largest audience

No.	Industry	Name	MAU
1	Mobile Social	WeChat	944,979,000
2	Mobile Social	QQ	660,483,000
3	Financial Management	Alipay	645,505,000
4	E-commerce	Taobao	609,951,000
5	Online Video	iQIYI	556,285,000
6	Online Video	Tencent Video	553,062,000
7	Short Video Social	Douyin (TikTok)	486,006,000
8	Tools	Baidu	453,763,000
9	Mobile Social	Weibo	424,476,000
10	Online Video	Youku	415,009,000

SEARCH ENGINE

Baidu: China's Google

174 million
daily active
users.

World's **largest**
Chinese search
engine.

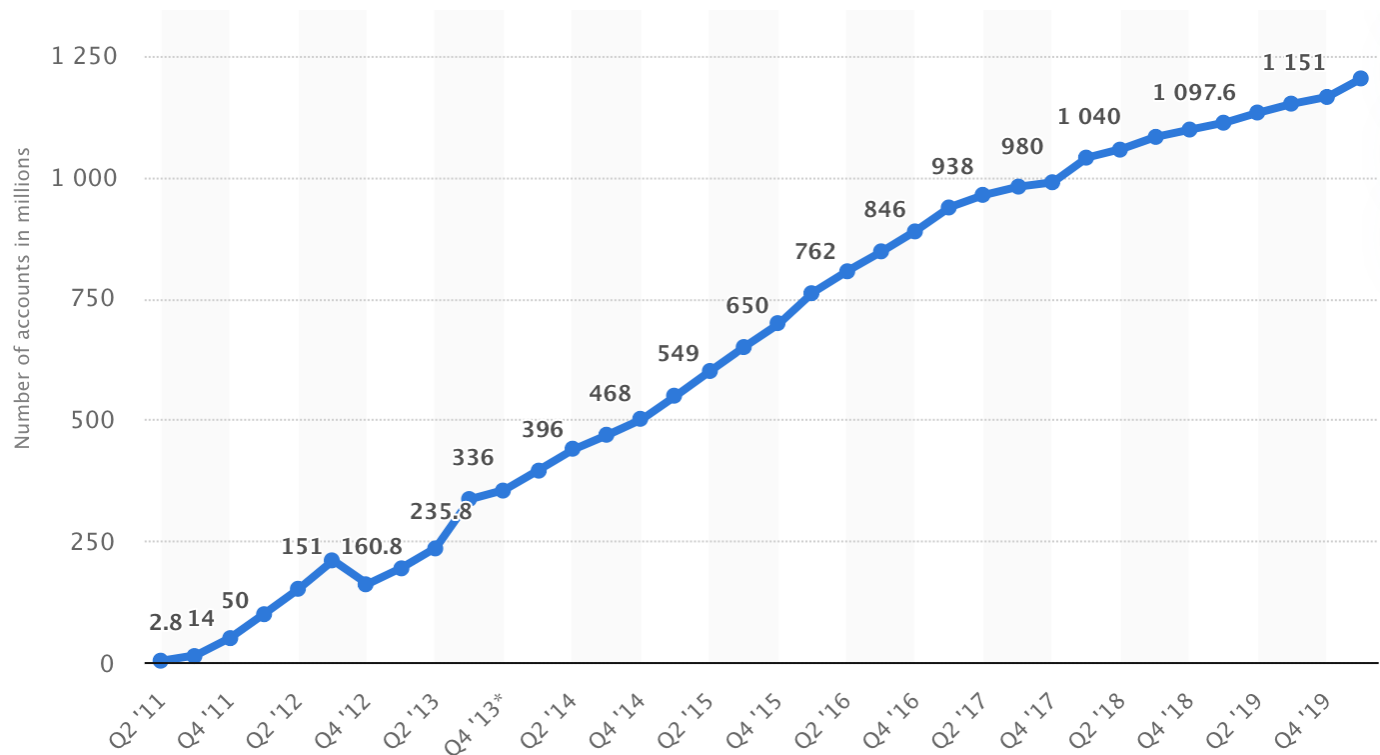
6 billion daily
search requests.



SOCIAL MEDIA

WeChat: China's most popular messaging

Number of monthly active WeChat users from 2nd quarter 2011 to 1st quarter 2020
(in millions)



WeChat has over **1.1 billion** users worldwide. 70 million of the registered accounts are outside China.

The app integrates the country's leading digital payment solution, **WeChat Pay**. Daily, the service sees an average of a billion transactions.

People in China spend over one-third of their online time on WeChat. It is their **most frequented**

WECHAT MINI PROGRAMS

Sub-applications within the main app that give consumers access to a range of services and advanced features.

- Active users of WeChat Mini Program account for **78.9%** of total active users of WeChat
- WeChat users use **42.6** Mini Programs per month

KEY OPINION LEADERS

KOLs have become a key marketing tool



In China, Word of Mouth (WOM) is incredibly important in terms of consumer decision making- 20 to 50 percent of all purchasing decisions are influenced by it.

In 2019, **China's KOL** Industry was valued at over USD 8 billion.

Young millennials and Gen Z take KOL opinions on face value. 70% of Chinese born after 1995 will turn to social media to directly purchase products as opposed to other channels – compare this with the global average of 44%.

- 71% of marketers say the quality of customers and traffic from KOL marketing is better than other sources.
- 89% of businesses say their ROI from KOL marketing is comparable to or even better than other marketing channels

LIVE STREAMING

The new way to sell



WHAT IS LIVESTREAM E-COMMERCE?

Livestreaming is becoming a go-to option for Chinese consumers seeking new products, promotions, or an impulse buy on a deal.

It hosts real-time broadcasting of video content by presenters that model or try products. Viewers can immediately purchase the item from an embedded link online.

- In 2019, the livestreaming e-commerce market was worth an estimated RMB 440 billion (around \$63 billion).
- This represented a 71.2% YoY growth from 2018.
- It also made up 9% of total e-commerce sales in 2019.
- The number of e-commerce livestreaming sessions topped 4 million in the first quarter of 2020.

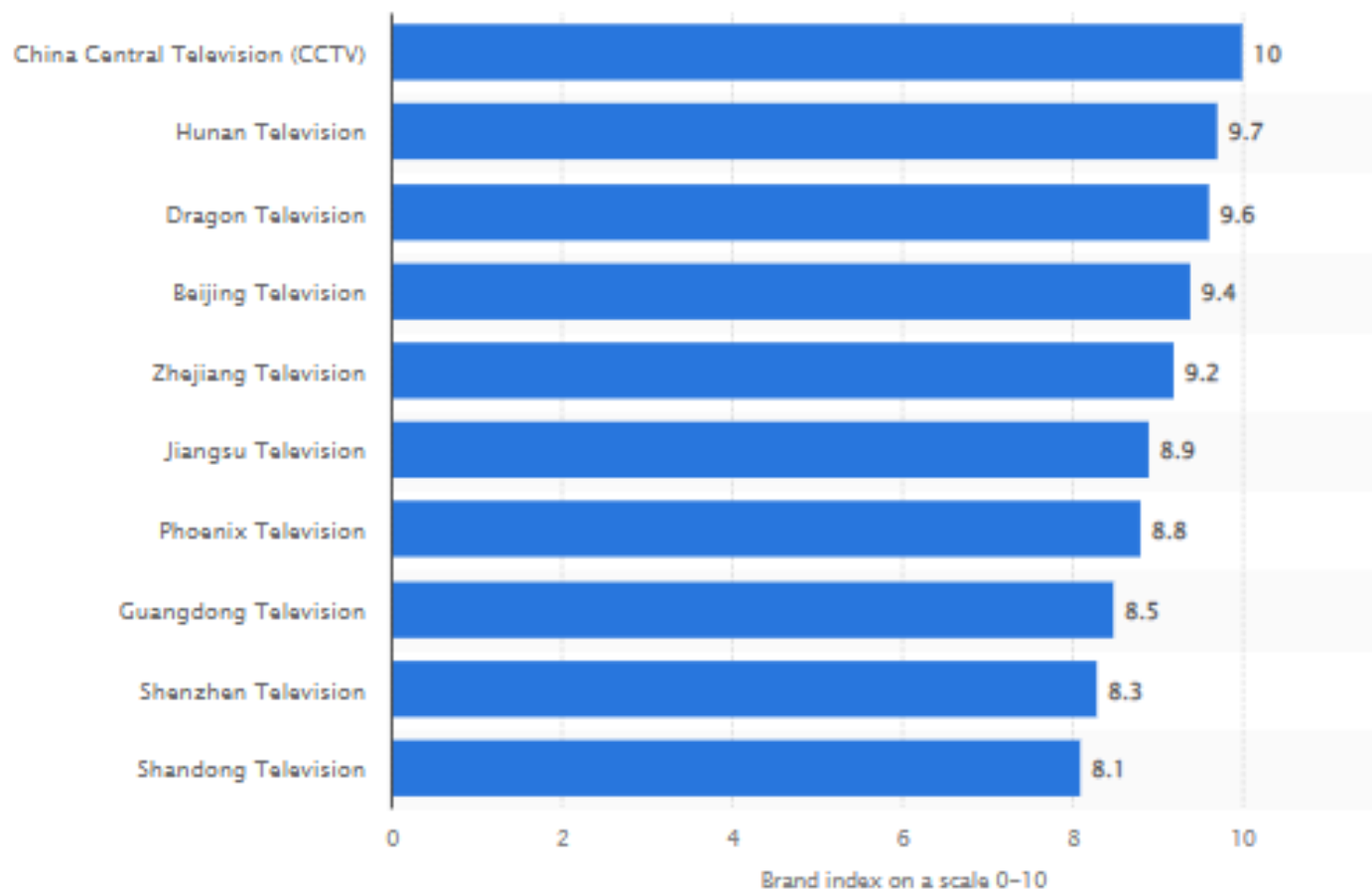
TELEVISION



TV IS A PROMINENT MEDIUM IN EVERY HOUSEHOLD

China is the largest market of television viewers

Brand index of largest television stations in China as of July 2022



Over 99.25% of China's population has access to television

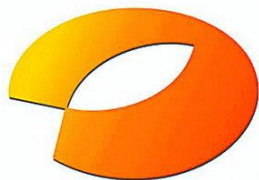
CCTV (China Central Television) is the major state television station in Mainland China, with a network of 20 channels and accessibility to over one billion viewers

TV viewing is a communal activity and is particularly popular in the countryside

TOP TV STATIONS



CCTV first broadcast in 1958. It is China's state television broadcaster. Now it has 22 channels broadcasting to China and the world in several main languages such as Chinese, English and Spanish. Its major channels include CCTV1(Integrated Channel), CCTV2(finance channel), CCTV6(movie channel), CCTV5(sports channel), CCTV news channel. CCTV 8 drama channel.



Hunan Satellite Television is China's most popular provincial TV station. It is China's second most-watched channel, second only to CCTV. The channel features various TV shows and exclusive TV series. Its Jinying Cartoon Satellite TV channel is also popular among children.



Phoenix Satellite Television is a Hong Kong-based Chinese television broadcaster. The channel serves the mainland China (blocked in Mainland China), Hong Kong and other areas where Chinese live around the world.



Shanghai Dragon Television or Dragon TV is a provincial satellite TV station owned by Shanghai Media Group. Currently, Dragon TV's signal covers most of China, including Macau, Hong Kong, Taiwan and overseas in North America, Japan, Australia, Europe, Worldwide and other countries and regions landing. It is Asia's largest open-press studio and the largest television news production and broadcasting of news organizations.

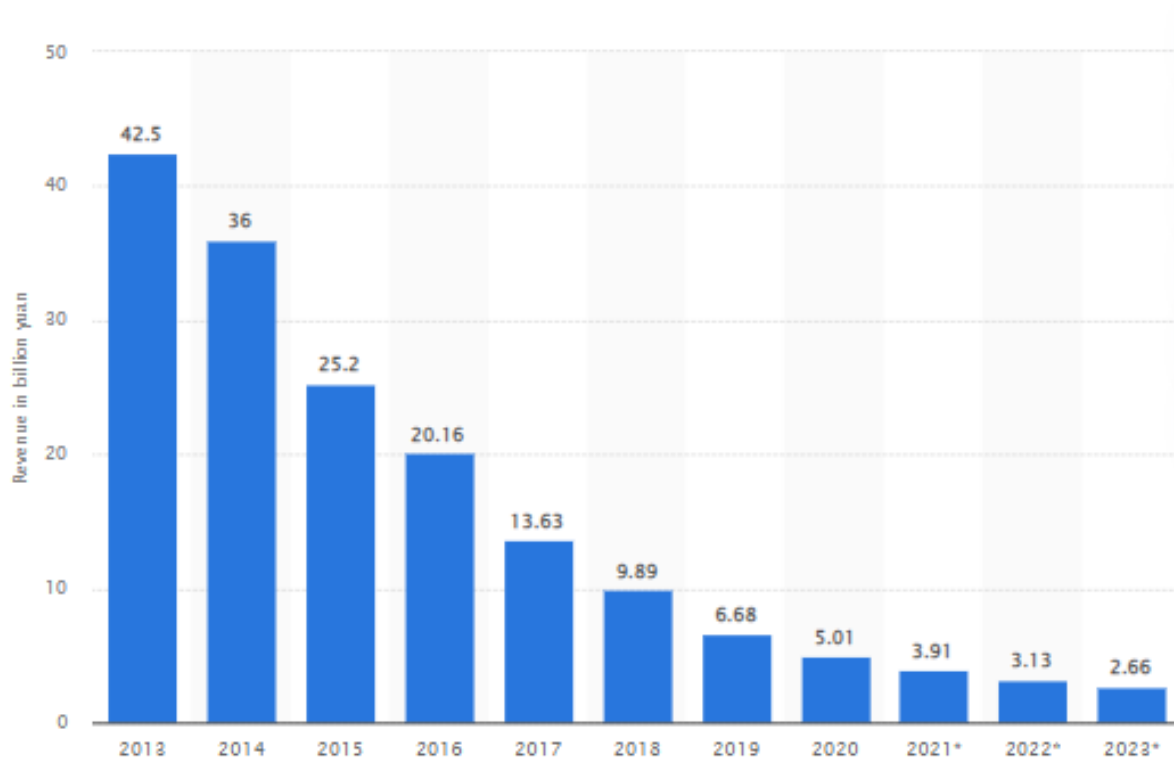
PRINT



THE TRADITIONAL PRINT MARKET IS SHRINKING

A declining readership but a loyal core audience

Annual newspaper advertising spending in China



While the number of print copies has declined by 5%, the reach of print remains stable.

Traditional media has begun to merge in the direction of new media due to rapid penetration of internet

Senior managers in state owned and private companies read the newspaper to track China's latest principles for impact on business environment.

TOP PRINT TITLES

CAIXIN CENTURY WEEKLY

Circulation: 220,000

Frequency: Weekly

Language: Simplified Chinese

Caixin Century Weekly media has the most valuable readers in China. The magazine's readers are mainly aged between 30 to 50 years and occupy key positions at top enterprises. More than 80% of the readers hold decision-making authority over business purchases.



CAIJING MAGAZINE

Circulation: 200,000

Frequency: Bi-weekly

Language: Chinese

Caijing magazine is an independent Finance and Economics magazine based in Beijing that covers societal, political, and economic issues, with a focus on civil rights, public affairs, and business. Its readers are mainly in China's most important government, finance, and academic offices, making it one of the country's most influential publications.



GLOBAL TIMES

Circulation: 1,500,000

Frequency: Daily

Language: Chinese and English

The Global Times is a daily tabloid newspaper under the auspices of the Chinese Communist Party's People's Daily newspaper, commenting on international issues from a nationalistic perspective. The tabloid is published in both English and Chinese.



TOP PRINT TITLES

CBN WEEKLY

Circulation: 50 issues annually

Frequency: Weekly

Language: Chinese & English

CBN weekly is a weekly business news magazine, founded by Shanghai Media Group. It is one of the most cited sources of Chinese financial information by the international financial media. CBN weekly is the market share leader, circulation leader and advertising sales leader of the business magazine market in China.



BEIJING EVENING NEWS

Circulation: 1,200,000

Frequency: Daily

Language: Chinese

Comprehensive Metropolis Daily in Beijing. The average reading rate per issue reaches 53.5%, making it the preferred choice of daily print media by Beijing residents.



21ST CENTURY BUSINESS HERALD

Circulation: 762,000 daily

Frequency: Monthly

Language: Chinese

21st Century Business Herald is a leading business newspaper in China run under the Southern Newspaper Group. With an expertise in economics, the paper aims at analyzing the international environment, monitoring the Chinese economy, observing industry trends, and guiding healthy development.



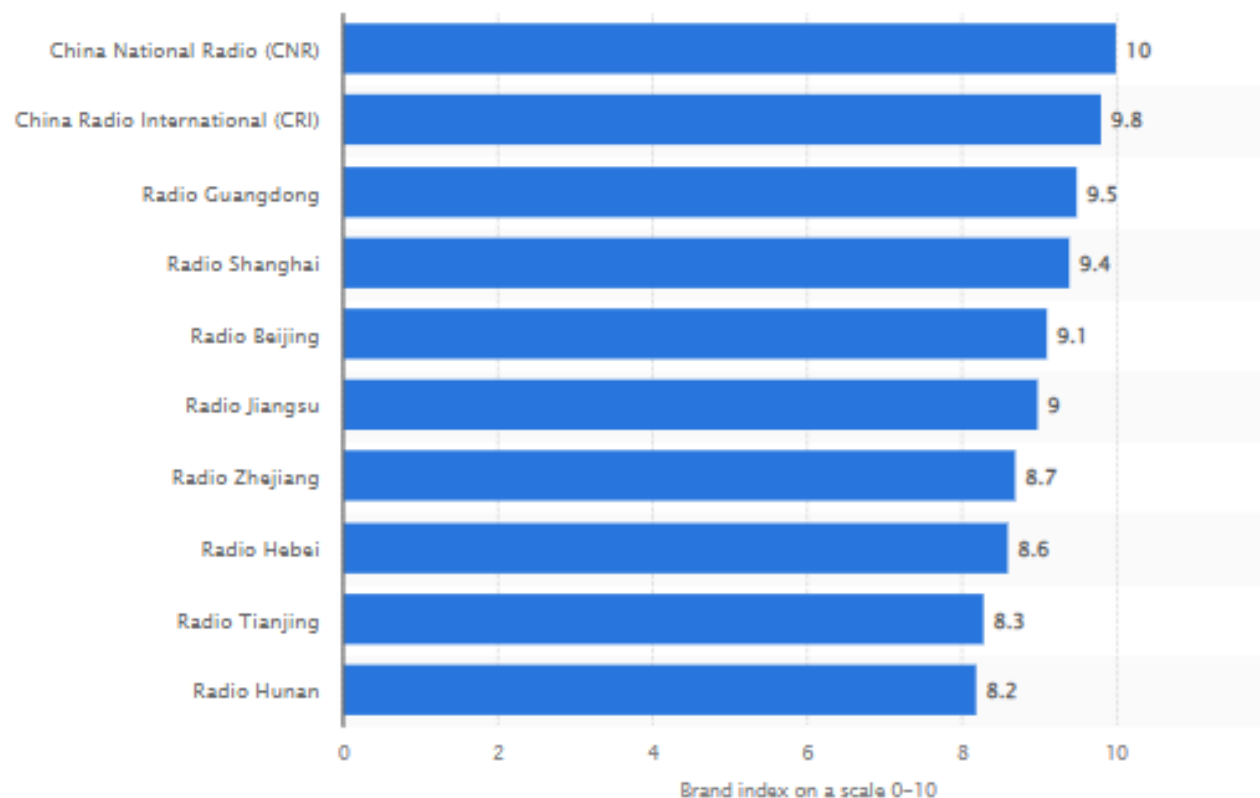
RADIO



RADIO HOLDS ITS GROUND

Over 3000 stations operate to serve over a billion people

Brand index of largest radio stations in China as of July 2022



- A constant and incrementing time spent with radio suggests a loyal audience base, primarily tuning in during commute. It reaches 22% of the population daily

TOP 3 RADIO STATIONS IN CHINA



The largest state-run broadcaster in Mainland China, China Radio International delivers high quality streams in Mandarin through a number of different channels. It broadcasts in 59 different languages to the world.



China National Radio (CNR) is one of the best radio outlets for finding out more about Chinese topics. Their premier channel "Voice of China" is a great place to hear more about Chinese news, politics and culture



Shanghai Media Group is the huge conglomerate that owns large amounts of both radio and television programming for the city of Shanghai. Given the city's status as a blooming cultural and artistic hub, it's a great place to tap into China's vibrant popular culture.

OUT OF HOME

Represents 6.1% of total ad spending in china

Total Media Ad Spending Growth in China, by Media, 2017-2022

% change

	2017	2018	2019	2020	2021	2022
Digital	27.0%	25.0%	21.0%	16.5%	13.0%	10.0%
Out-of-home	9.0%	6.0%	3.0%	2.0%	2.0%	3.0%
Radio*	4.0%	2.0%	1.0%	1.0%	1.0%	1.5%
TV**	-1.0%	0.5%	0.5%	1.0%	0.5%	1.5%
Magazines***	-10.0%	-7.5%	-5.0%	-4.0%	-3.0%	-2.0%
Newspapers***	-12.0%	-10.0%	-7.0%	-5.0%	-3.8%	-2.7%
Total	14.9%	15.3%	13.8%	11.6%	9.5%	7.8%

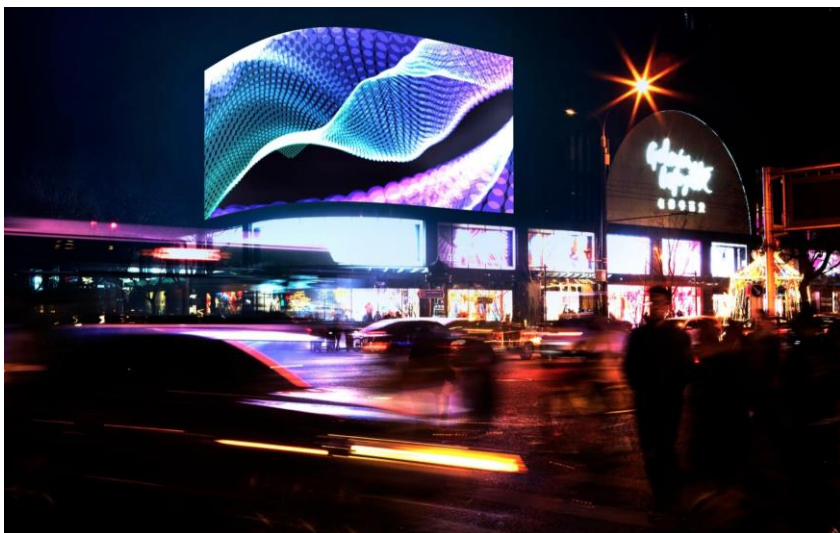
Note: excludes Hong Kong; *excludes off-air radio and digital; **excludes digital; ***print only, excludes digital
Source: eMarketer, Sep 2016

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www.eMarketer.com

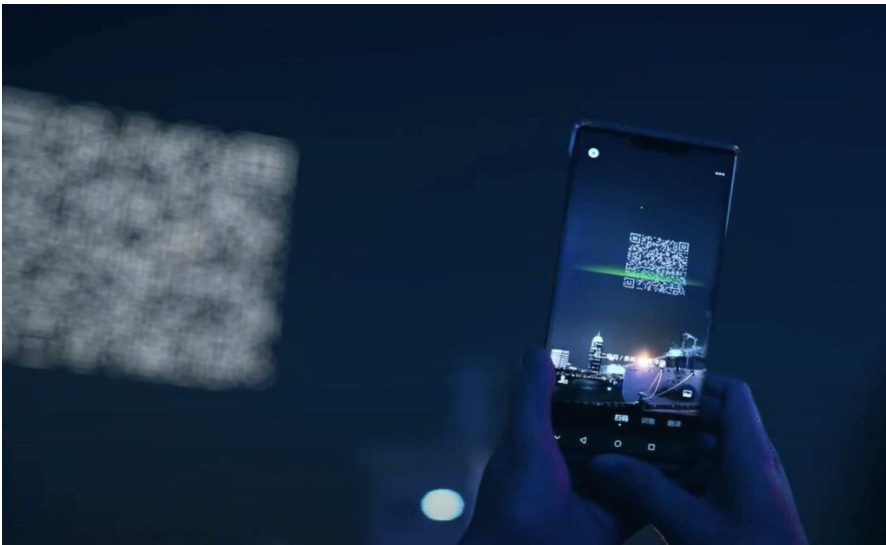
- OOH plays a major role in reaching mass Chinese audiences. It penetrates 73% of the population.
- While it commands the highest spends after digital and TV, spends have been increasing at a greater rate than most media.

ICONIC SCREENS PRESENT ACROSS MAJOR CITIES



OUT OF HOME

OOH advertising is leveraging technology to innovate and remain relevant to attract new expenditure

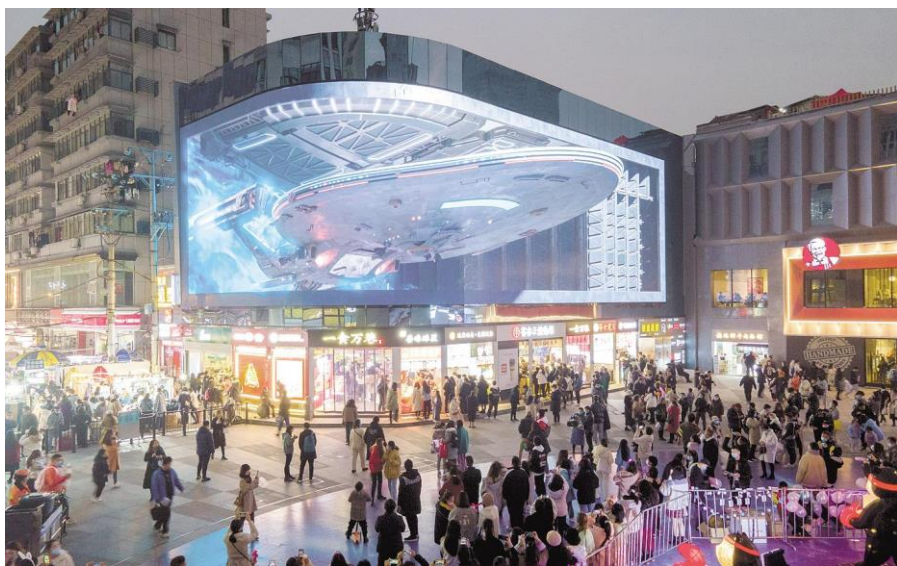


The Bund in Shanghai sees drone shows where companies use drone lights to create 3D billboards and advertise

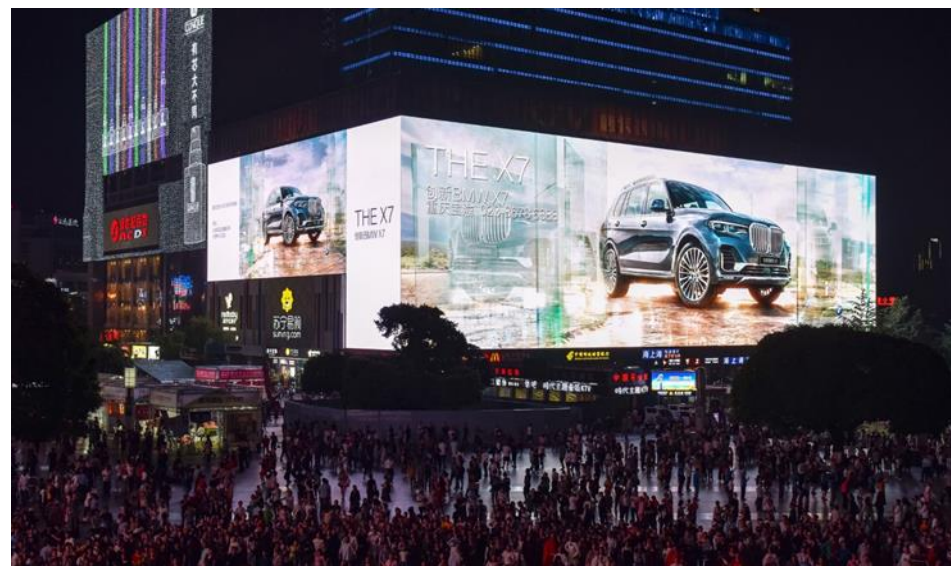
A Chinese video streaming website Bilibili used this opportunity to create a scannable QR code in the sky using 15,000 drones. This type of innovation makes China the market leader in DOOH.

OUT OF HOME

3D billboards on the rise in the major cities



1024 m² 3D billboard in Jiangnan Road, Wuhan



3788 m² 3D billboard in Guanyin Bridge Business District, Chongqing



888 m² 3D billboard in Taikoo Li, Chengdu

Let's Discuss

Tel: +971 4 425 3300

Email: info@themediavantage.com

Website: www.themediavantage.com

Location: 8th Floor, Reef Tower, Cluster O, JLT, Dubai,
UAE

